ADVANCED (K) > DEFINED CONTRIBUTION INVESTMENTS

# Move Your Retirement Plan Business Forward

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MFS is proud to be partnering with Broadridge Retirement and Workplace to deliver Advanced (k), our comprehensive program that can help you excel at communicating with and managing your plan sponsor clients.

Advanced (k)® from MFS®

Advanced (k) integrates innovative strategies and powerful content, enabling you to attract new clients, build rewarding relationships and grow your retirement plan practice.

Strategic relationship management and client retention tools to deliver added value

Advanced (k) features three modules, as shown below. Each module offers a number of impactful tools, including detailed PowerPoint presentations, easy-to-follow playbooks/toolkits, client-ready templates, and customized reports and analyses.
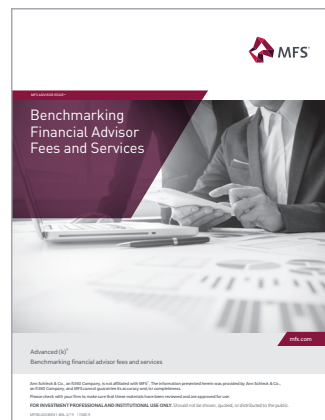
Benchmarking financial advisor fees and services

Resources to educate you on fee norms and services and tools to demonstrate your value to clients
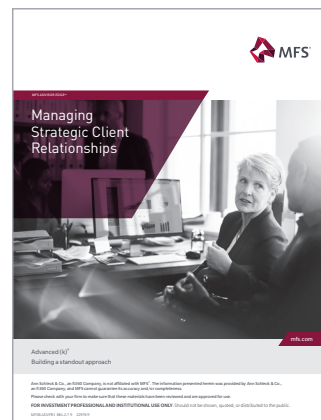
Managing strategic client relationships

A client-needs analysis and broad annual relationship plan to help you effectively manage and retain your plan sponsor clients

Building a standout approach

Tips and tools to help you develop a compelling finals presentation that separates you from the competition

Together, these tools will enable you to focus on the issues most relevant to your retirement plan practice and thereby create tangible results for your clients.

Start building stronger client relationships today. Integrate Advanced (k) into your retirement plan practice by contacting MFS' DC investment specialists at 1-800-343-2829.

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